privia

Installation Instructions

Contents

Synopsis

This document guides the user through an installation of the Privia Client and Privia Toolbar on a Windows system.

Installation Instructions

Download the Client

1. Open a web browser

2. In the address bar, go to https://{ServerName}/privia/download/PriviaSetup.asp where "{ServerName}" is the name of your organization's Privia server

3. Select the link beside "Download" that says "Privia Client". A file download security will appear with the option to Run/Save/Cancel, select Run. An Internet Explorer Security Warning will display, select Run.

Figure 1. Download the Privia Client
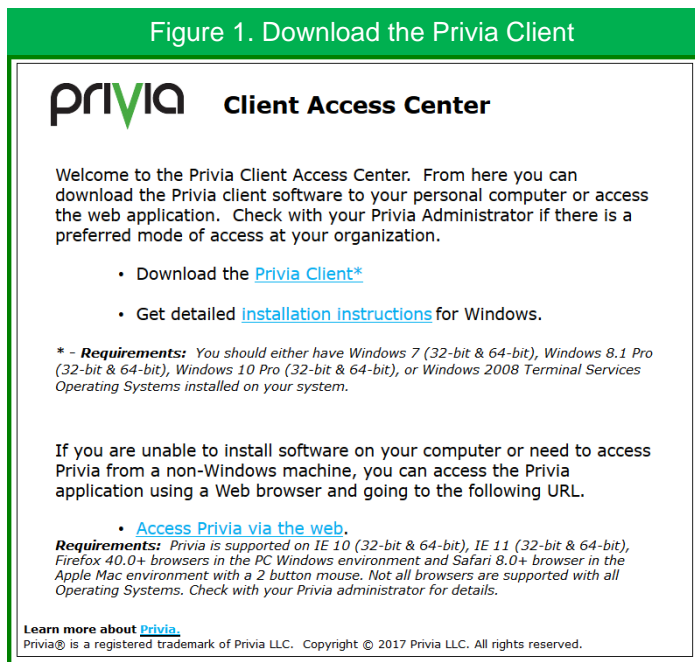
Install the Client

After Privia is installed:

1. Open the downloaded file

2. Click the "Next" button in the initial dialog

3. Select the radio button beside "I accept the terms in the License Agreement"

4. Click the "Next" button

5. Select the folder location in which to install the Privia application (the default location is usually the best, it can be anywhere, just ensure that the 'C:' drive is selected)

6. Click the "Next" button

7. Select the "Install" button

8. A dialog will display asking if you want to remove all the Privia Profiles that have been created, click the "Yes" button

9. Installation is now finished, select the checkbox beside "Launch Privia Platform" (if not already)

10. Click the "Finish" button

Figure 2. Client Installation Wizard
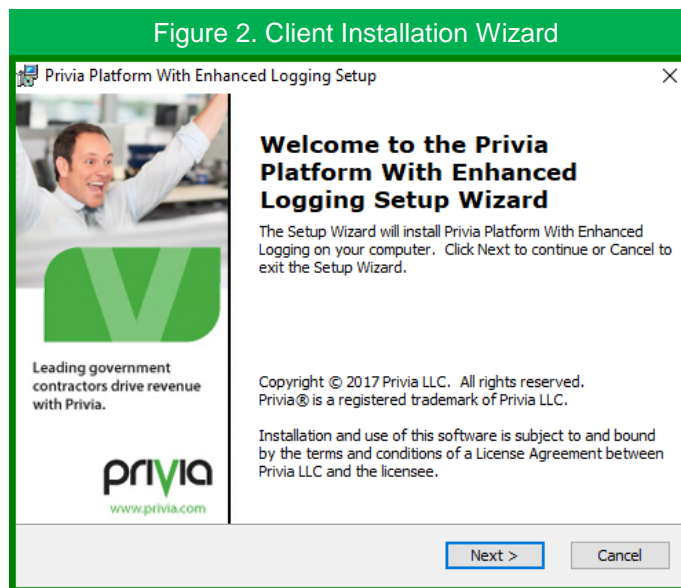
Privia Profiler

To complete registration to build your local profile:

Figure 3. Client Installation Wizard

1. Once the Privia Profiler is opened, the radio button beside "Create a new profile" will be selected, click the "Next" button

2. A few fields will display (as shown in Figure 3), this is where to enter the credentials, which should have been provided as part of the Invitation to Join Privia invitation email (if you do not have this invitation, contact your Privia Administrator). Please note that your Privia credentials are unique to Privia and are not derived from other user accounts such as Active Directory.

3. Enter the following (information found in the Invitation to Join Privia):
   a. User Name
   b. Password
   c. Domain
   d. Server

4. The checkboxes beside "Fast HTTP" and "Secure (SSL) connection" should already be selected

5. Do not select "I am behind proxy/firewall" unless explicitly instructed by your Privia Administrator

6. Click the "Next" button

The Privia Profiler will begin synchronizing the local client with the Privia server, unless two-step authentication is set on the server; in which case an Access Verification dialog will display where you can enter the security token that has been sent to your email address. Once synchronization finishes, the "Log On to Privia" will display. To complete logon, please enter your password.

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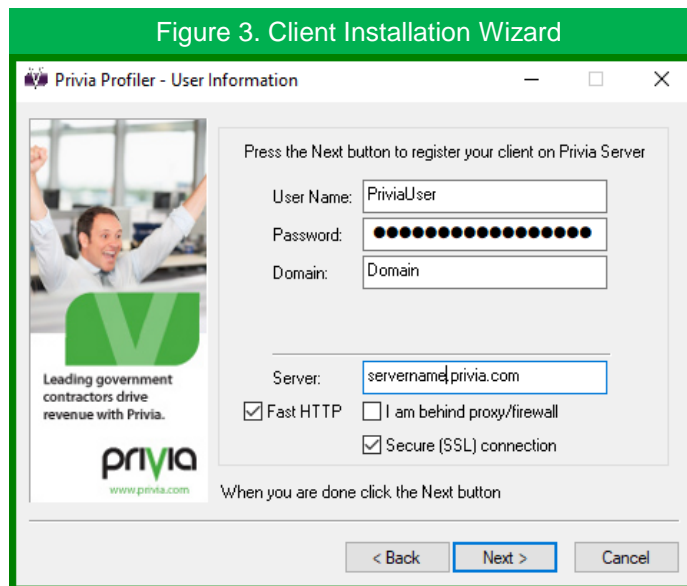
Installing the Privia Toolbar

In order to install the Privia Toolbar, you must have at least Administrator rights to do so; the toolbar may only be used within Internet Explorer

Downloading the Toolbar

1. Click the "Windows Start Menu"

2. Select "All Programs"

3. Open the "Privia folder"

4. Select "Download Privia Toolbar"

5. A file download security will appear select the "Save File" button

Installing the Toolbar

You will be guided through the Privia Toolbar Setup wizard.

1. Select the downloaded file

2. A dialog will appear that will ask "Do you want to install Privia Toolbar?" select the "Yes" button

3. Click the "Next" button in the Privia Toolbar Setup Wizard

4. Leave the default path selected (should be the 'C:' drive), click the "Next" button

5. Click "Install"

6. Now it is time to select the trusted data sources for the Privia Toolbar (it is best to leave all selected), click the "Close" button. If un-selecting any options you will need to click the "Update Trusted Sites" button afterwards and then the "Close" button

Figure 4. Update Trusted Sites as Needed
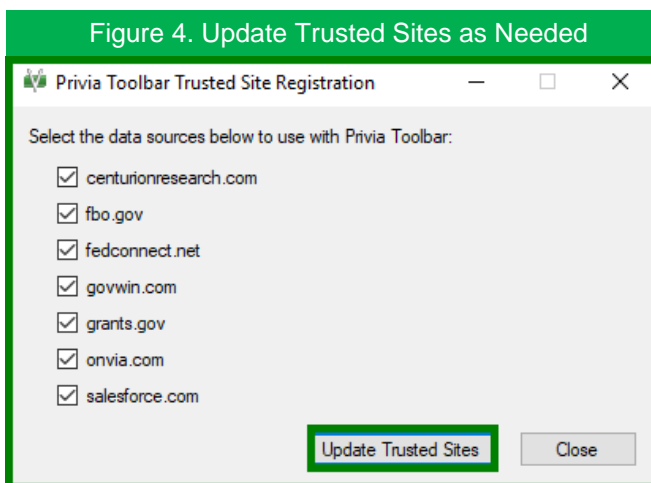
Configuring the Toolbar

In order for Opportunities to successfully import into your Privia pipeline the toolbar must first be configured:

1. Open Internet Explorer

2. Click the Gear icon in the top right hand corner

3. Select "Manage add-ons" (shown in Figure 5 to the right)

The Manage Add-ons dialog will display with a list of all the add-ons that are currently configured (and otherwise) for Internet Explorer. If you do not see the Privia Toolbar in the current list:

1. Use the drop-down menu under "Show" near the bottom left of the list

2. Select "All add-ons"

3. Look for a section called "Privia LLC" and make sure that the add-ins for the Privia components are enabled

Summary

That's all there is to installing the Platform Client and the Privia Toolbar. If there are still questions that remain about this process, please contact your Privia Administrator.
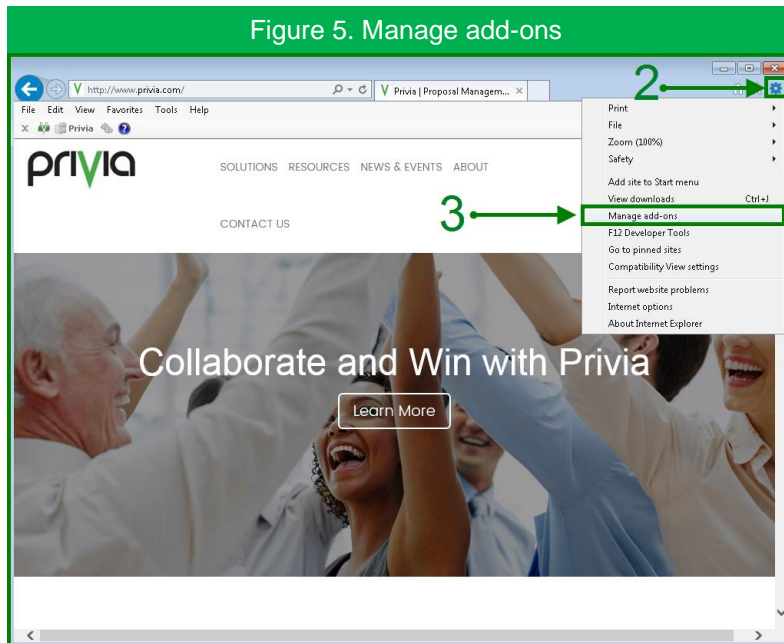

Figure 5. Manage add-ons

Figure 6. Show All Add-Ons